Planning & Scheduling – A Circular Process Supporting Continuous Improvement

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Presenter

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Who is Solufy?

- Founded in 2003
- 100% dedicated to achieving excellence in Maximo planning & scheduling
- Staff comprised of current and former Maximo users, consultants, implementers, planners and schedulers
- Creators of the AKWIRE Visual Suite for Maximo; utilized by customers world wide

Using a Planning and Scheduling Tool…

- Who actually plans / schedules their work?
  - How do you do it?
    - Paper (Post-it notes)?
    - Excel?
    - P&S Tool?

Agenda

- Data Requirements
- Data Requirements from a Process Perspective
- Advanced Planning & Scheduling
- Improving the Process and Doing it Again

- You are encouraged to ask questions at any time

Data Requirements

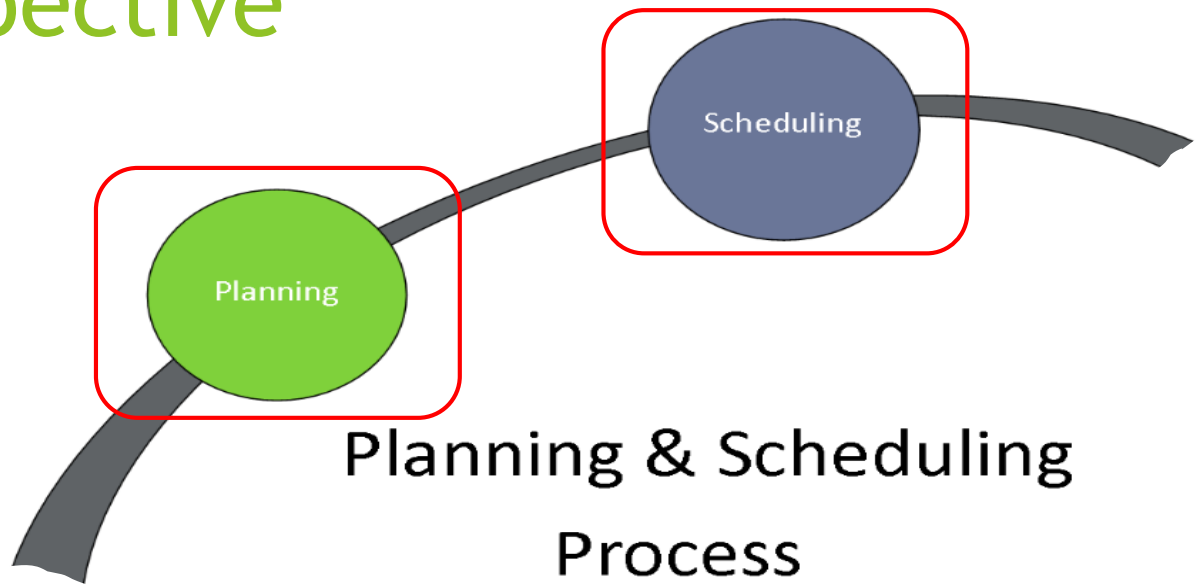
What normally comes to mind:

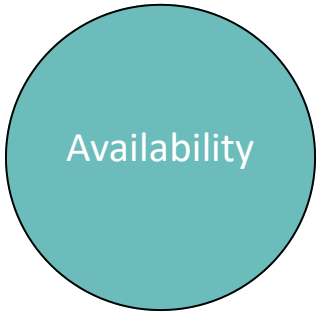
- Calendars/Shifts
- Crafts/Skills
- Laborers
- Job Plans
- Work Orders

Other considerations:

- Time Off/Extra Work
- Time Capture
- Schedule Compliance
- Job Plan Reviews

Data Requirements from a Process Perspective

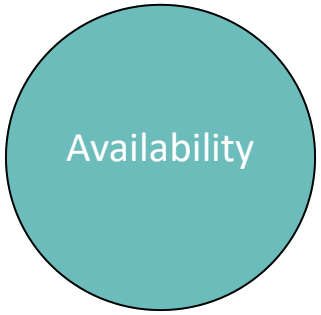




Availability – Who is available to do the work when you need it done?

- Calendars
- Shifts
- Time Off
- If your average worker has:
  - 3 weeks vacation
  - 1 week of sick time
  - 10 paid holidays

- Hours that impact your P&S
  - 6 weeks x 40 hrs/wk = 240 hrs
  - Workforce of 10 people
    - 10 people x 240 hrs = 2400 hrs
- Extra Time
  - Approved OT or shift changes?
- Not accounting for Time Off / Extra Work has a huge impact on your Planning & Scheduling!



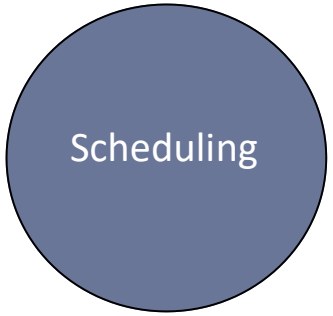
Availability – Who is available to do the work when you need it done? Cont…

- Other impacts of not knowing complete availability
  - PM Forecasts need to be aware of vacation, sick time, training …
  - Long Term P&S
    - Shutdown planning
    - Major projects
    - Etc…

Planning

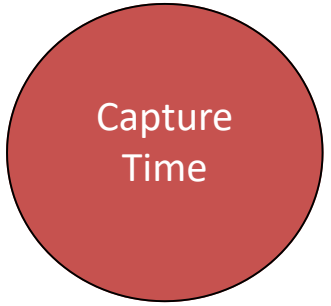
Planning – Do you have the information in your plans to get the schedule right?

- Ensure all items needed to schedule are populated and accurate (e.g. Status, Priority, Work Type, Supervisor, custom fields, etc…)
- Craft Requirements
- Planned Materials
- Tools
- Services
- Photos, Audio recordings
- Permits, LOTO, Attached documents
- Child and/or Task Work Orders



Scheduling – Are you doing what needs to be done when it needs to be done?

- What work must be done first? Normally based on a combination of:
  - Compliance / Regulatory Date
  - Priority
  - Critical Assets
  - Asset/Location Availability
  - Resource workload based on 100%, 80%, ???



Capture Time – Are you getting accurate records of the work being performed?

What does Capturing Time have to do with Planning & Scheduling?

- If you want to compare your Plan to what was actually performed, then you need to capture Actuals
- Are you capturing time at the WO level? If you plan to the task, do you also enter time at the task level?
- Allows laborers to capture feedback about the accuracy of the work they have been assigned

Schedule Compliance

Schedule Compliance – How closely does what you scheduled match what was done?

- What is Schedule Compliance?

  Percentage of scheduled WOs completed / Total number of scheduled WOs that should have been completed

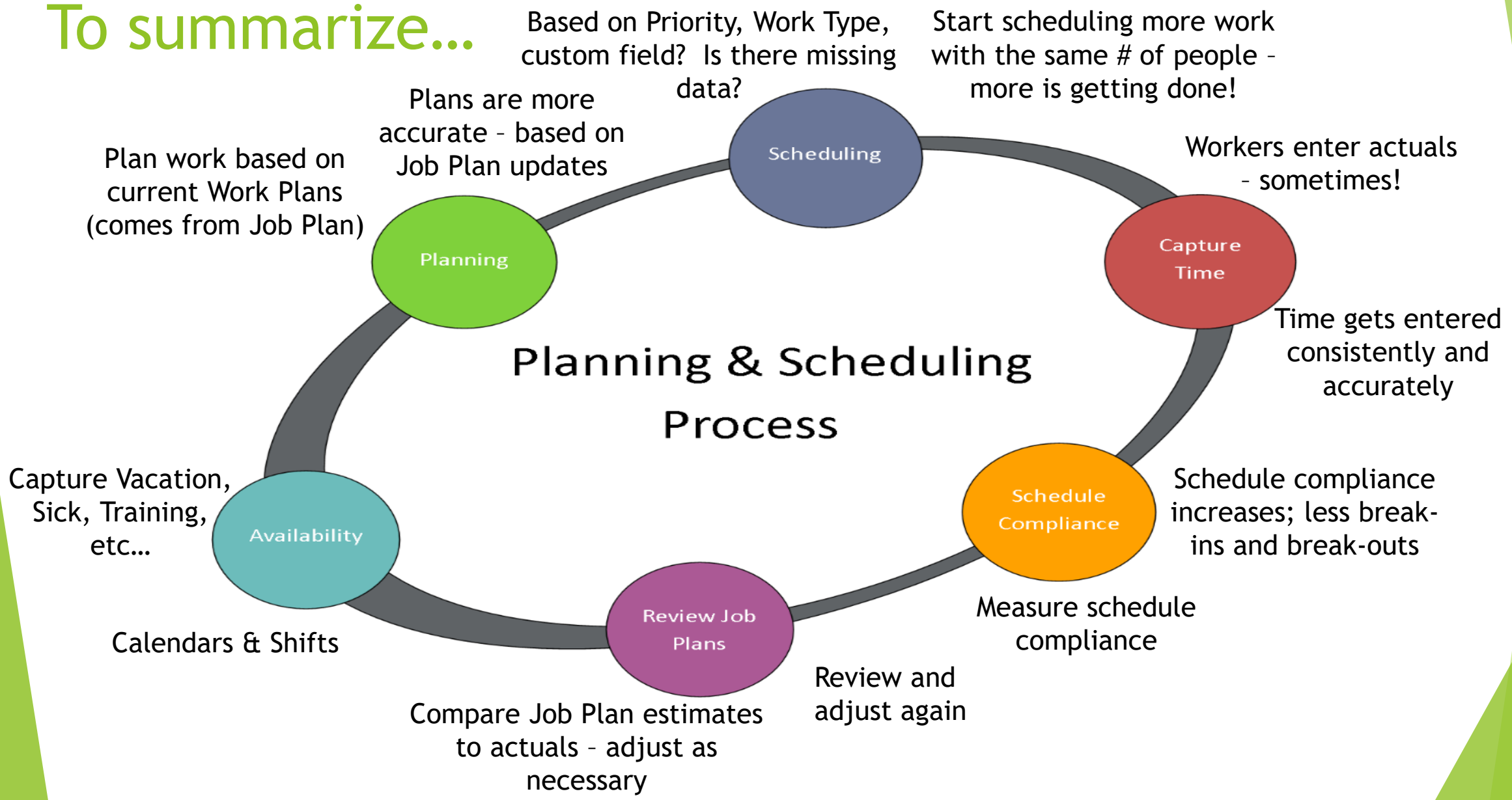
  - 10 WOs scheduled for this week
  - 8 WOs completed
  - Schedule compliance percentage = ??? 80%

Review Job Plans

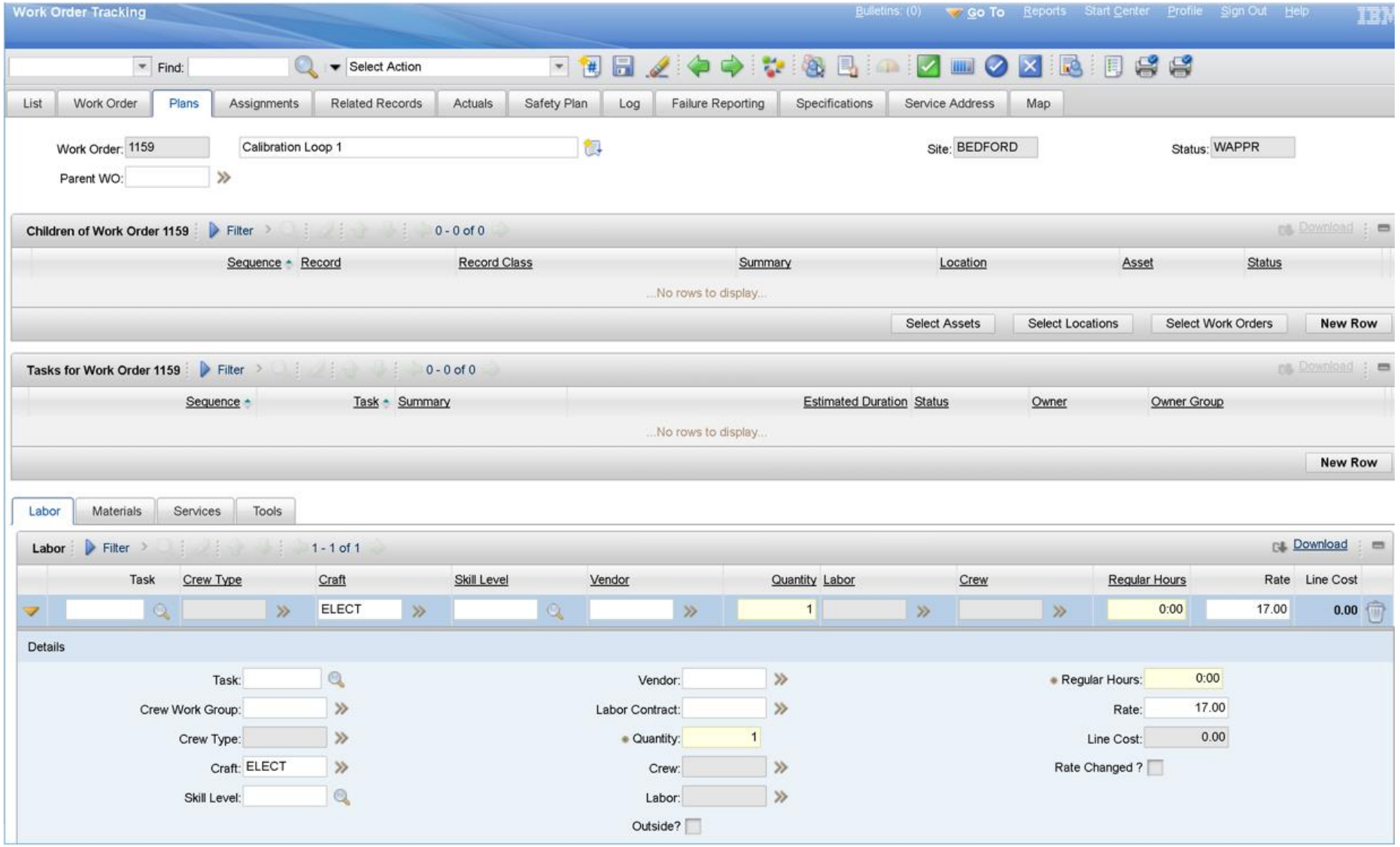
Review Job Plans – How can you improve the process for next time?

- Why do I need to review my Job Plans?
  - Misconception: Job Plan definitions don't change
- Many factors can require a Job Plan to be updated
  - Process improvements within Maximo
  - Aging workforce
  - New technology
  - Climate
  - Etc…

To summarize…



Advanced Planning & Scheduling



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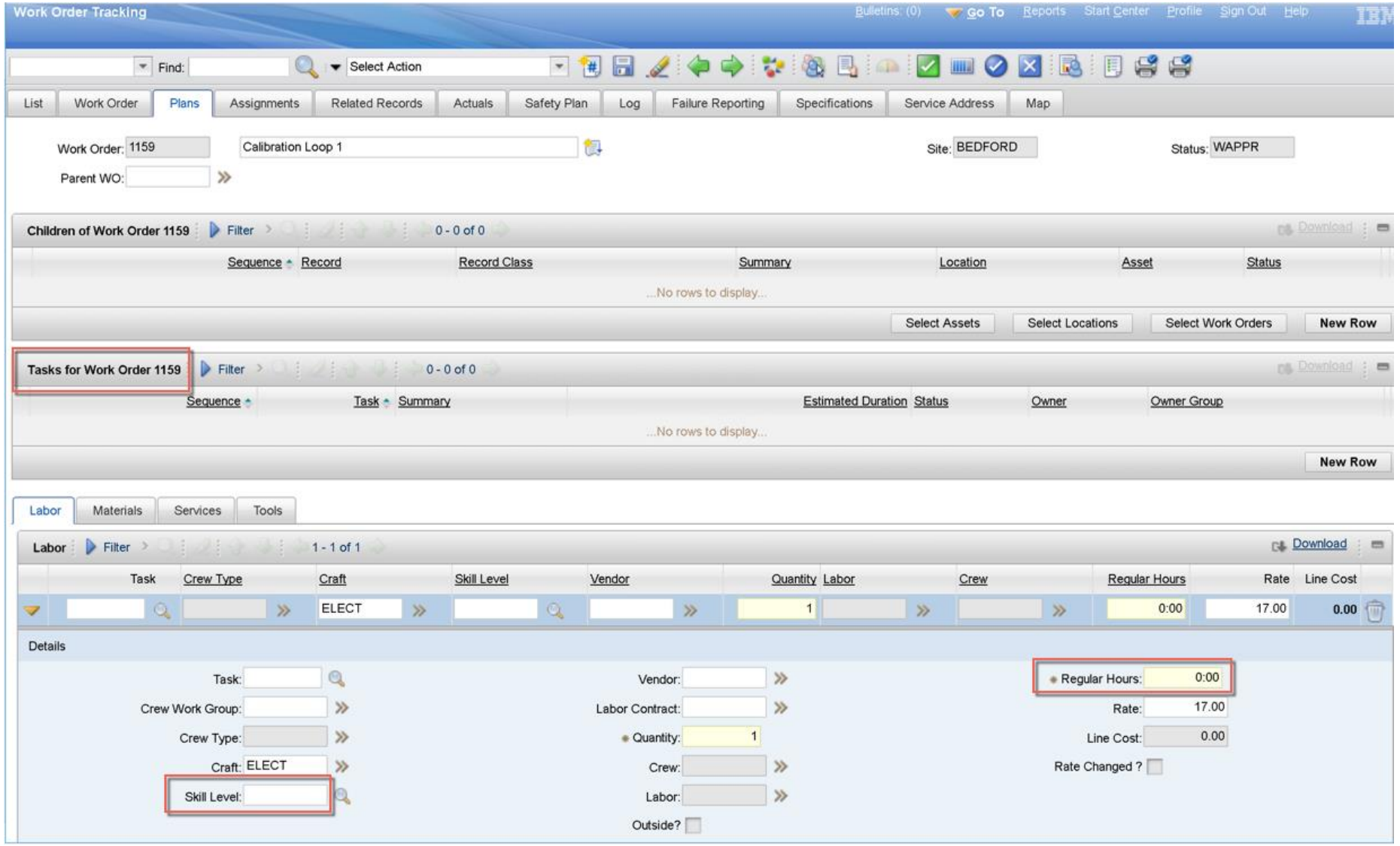
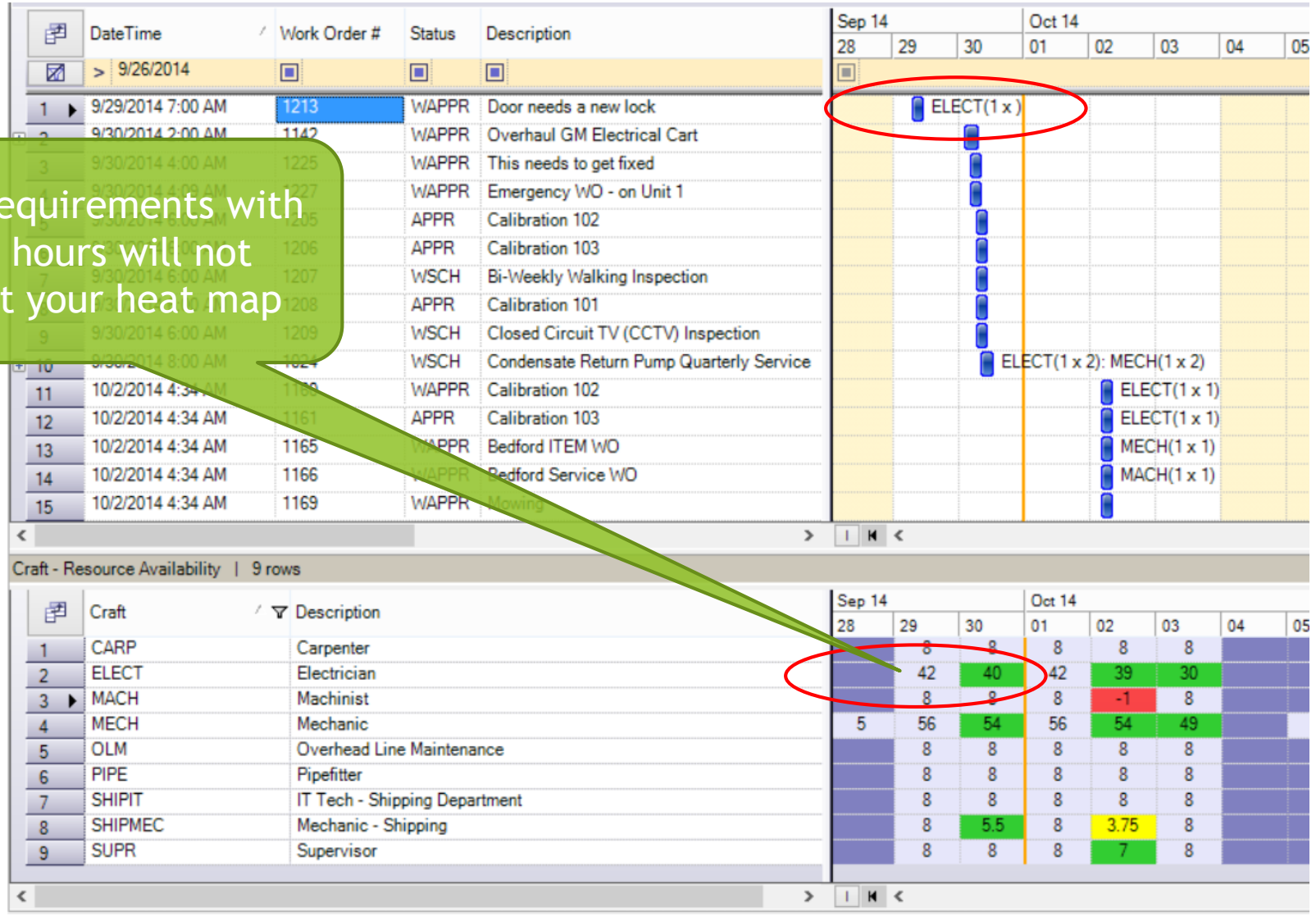


Advanced Planning & Scheduling

Craft Requirements with zero hours will not impact your heat map



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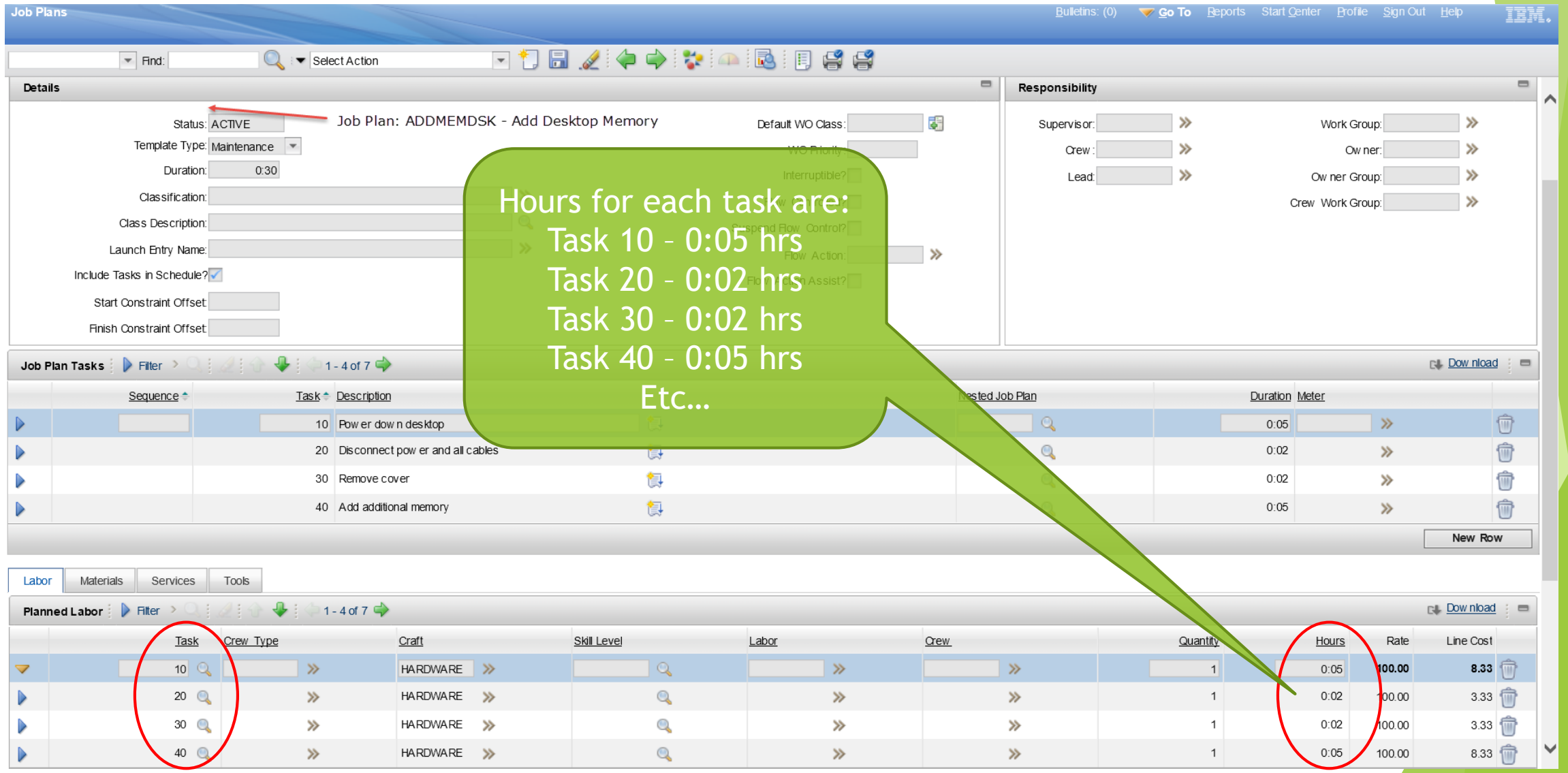

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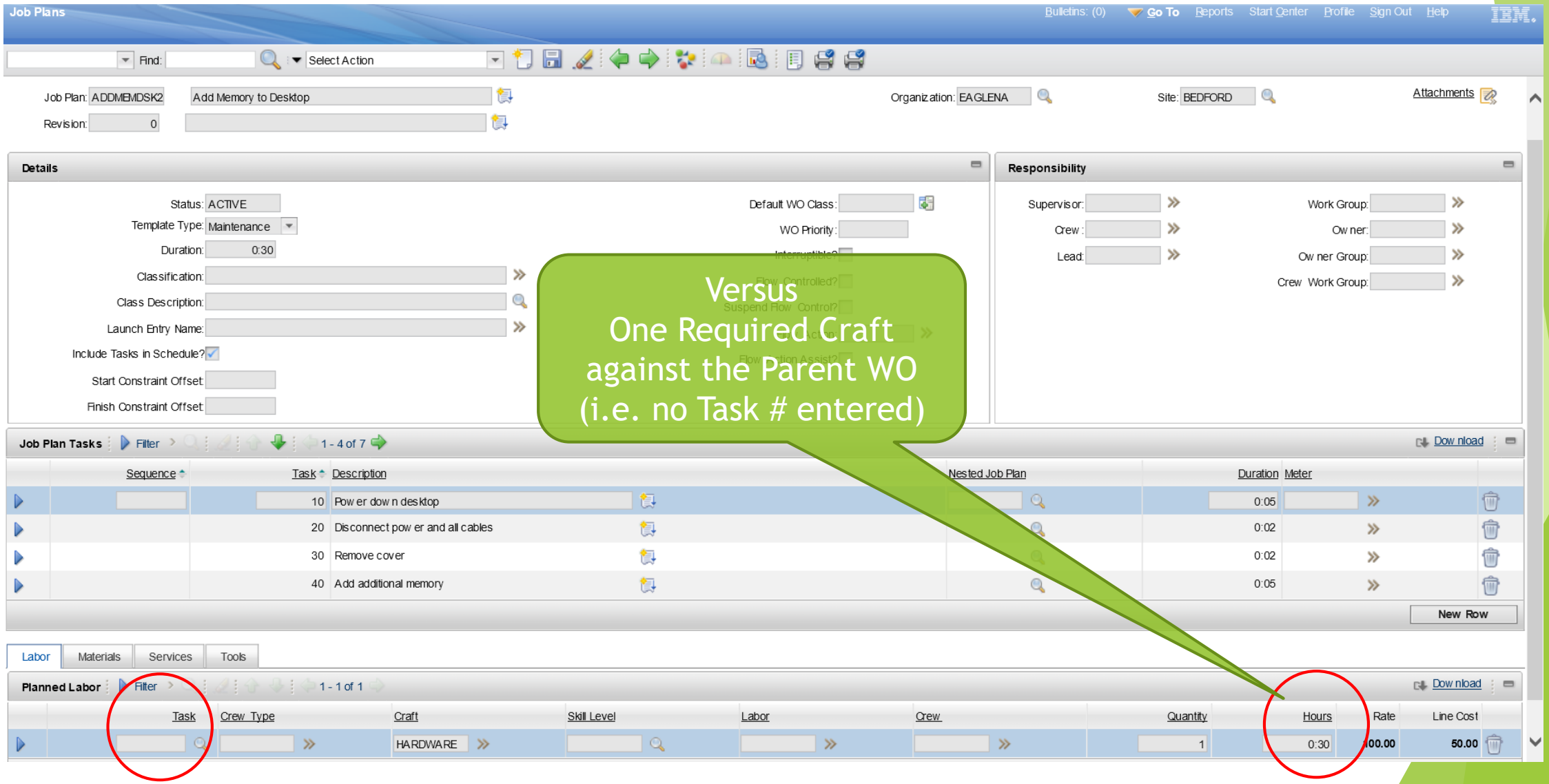

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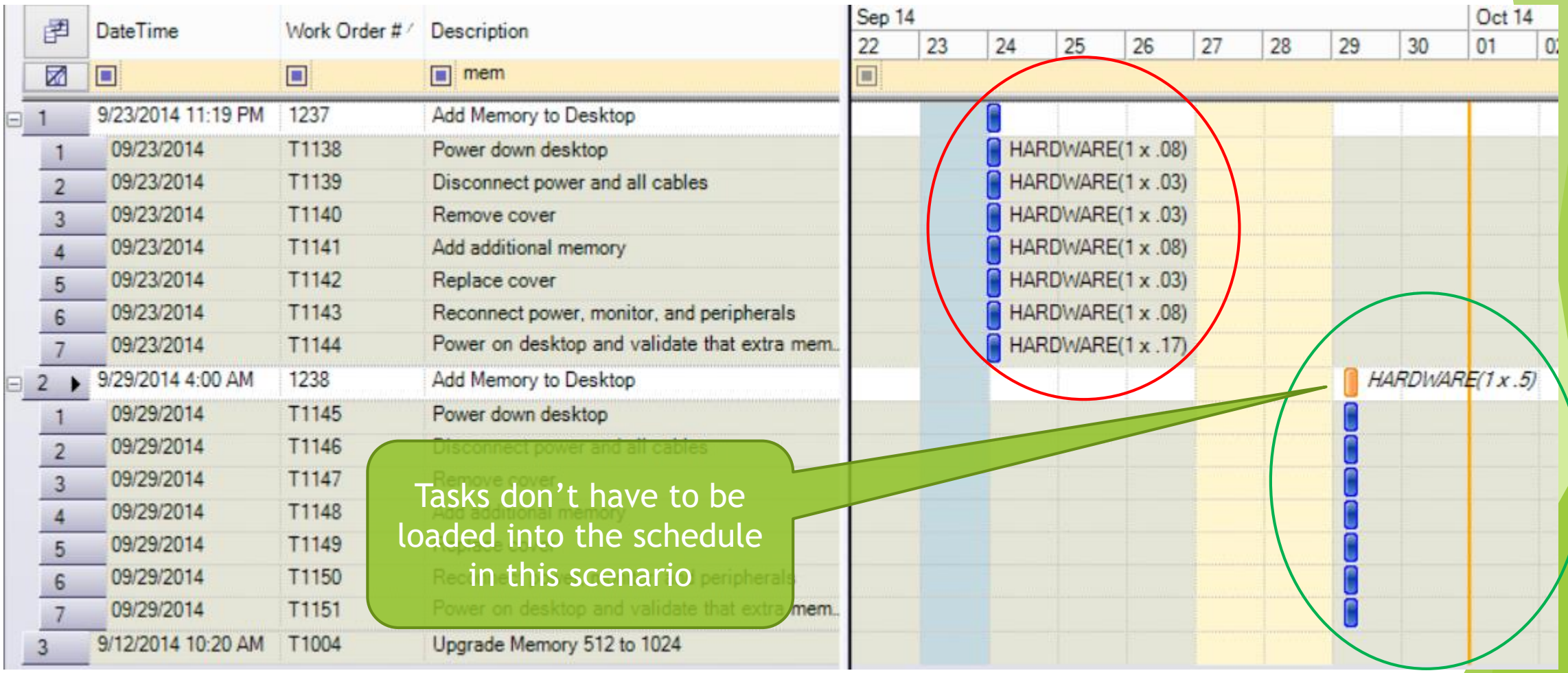

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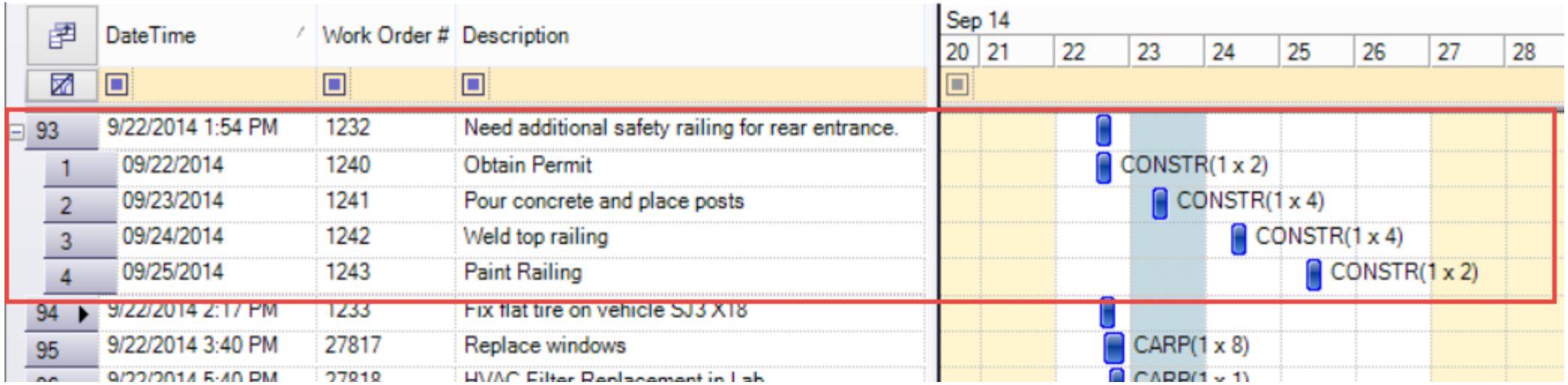
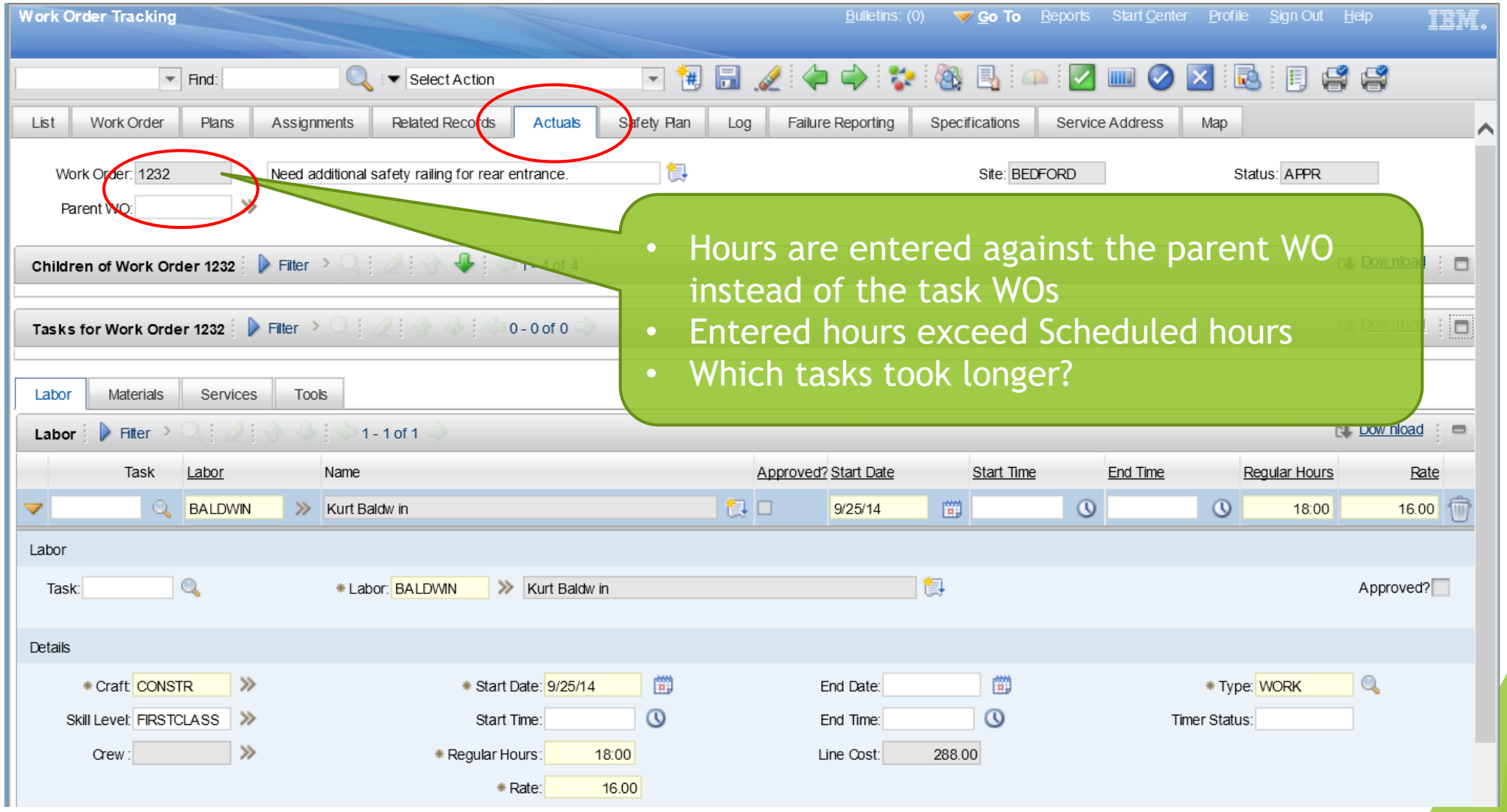


- Well defined WO and Tasks
  - Hours are appropriately defined and tasks are scheduled on separate days

Advanced Planning & Scheduling



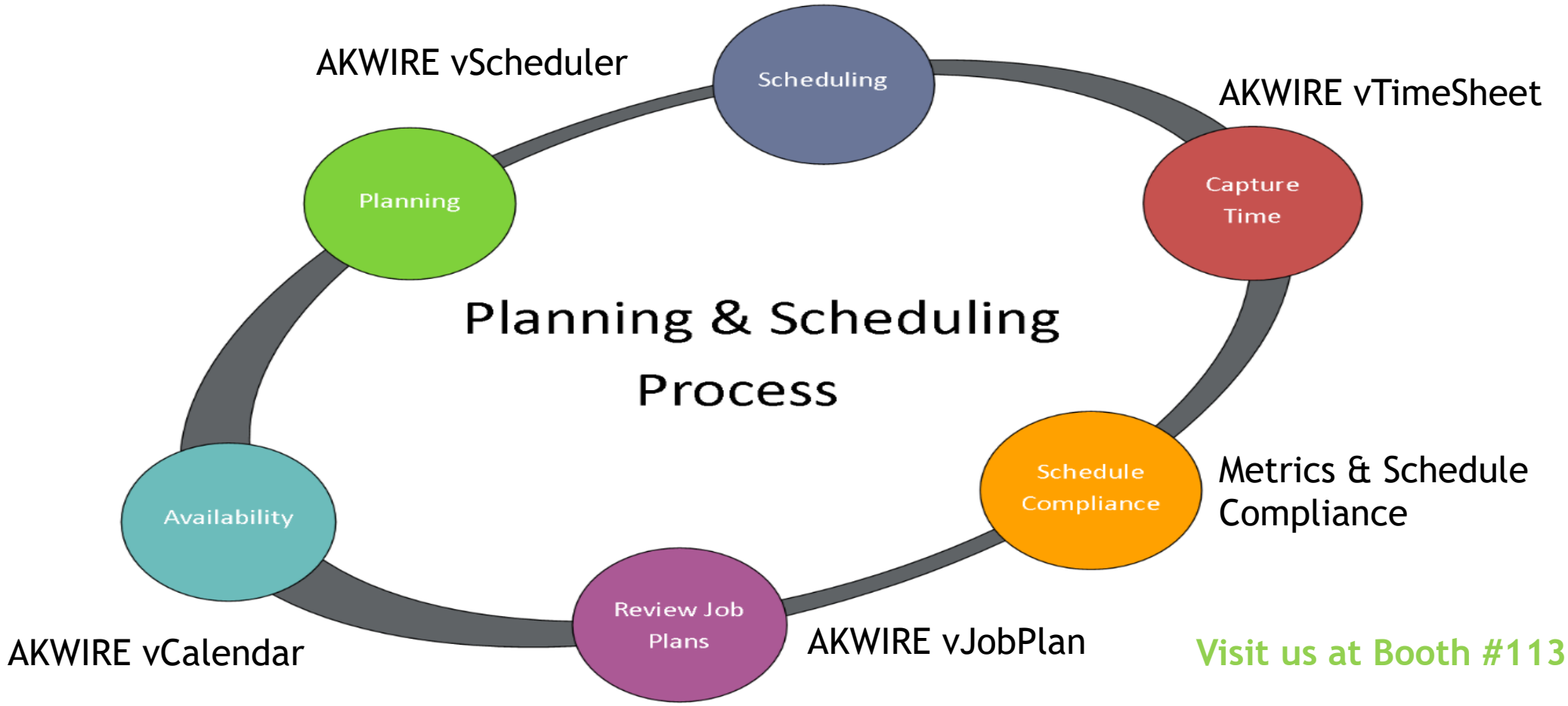
- Hours are entered against the parent WO instead of the task WOs
- Entered hours exceed Scheduled hours
- Which tasks took longer?

Advanced Planning & Scheduling - Recap

- Job Plans -> Work Plans should have Craft requirements and not ‘zero’ hours.
- Ensure Craft requirements entered against a task are not “too” defined (i.e. 0:05 hrs) unless it’s truly required
- If Planning & Scheduling to the task/child, try to capture hours at the task/child level as well

Evaluate Tools to help with your process

A comprehensive P&S suite will include tools to help you manage every step of the process



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Questions?

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